https://www.financial-planning.com/news/how-financial-advisors-plan-for-a-successful-parental-leave

Clockwise from top left, advisors who arranged their parental leave: Ryan Salah of Capital Financial Partners; Autumn Knutson of Styled Wealth (with her family); Yesenia Realejo of Tobias Financial Advisors; Maureen Donahue of Yardley Wealth Management; and Derilyn Freeman of Prudential Advisors (with her family).
Courtesy photos

Parental leave stress-tests a practice. Here's how advisors make it work
By Rob Burgess
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For financial advisors, parental leave can represent not only a personal milestone, but also a test of professional operational strategy. How well an advisor prepares clients and support staff for their time away can make the difference between strengthening client trust or creating disruption.

Autumn Knutson, founder and lead financial planner at Styled Wealth in Tulsa, Oklahoma, has taken two parental leaves of 18 weeks each. Ahead of each leave, she met with clients to tie up loose ends. She gave them a choice about what to handle before or after her time out of office, confirmed they knew who to contact during her absence and scheduled the next meeting for after her return. That clear hand-off made the process smooth.

"Clients in my experience have been very accommodating, understanding and also felt cared for," she said.

Knutson's experience reflects a broader reality: Parental leave can be rewarding, but advisors who approach it with the same rigor they bring to financial planning, especially around communication and continuity, are likely to protect both their time away and their book of business.

A mother of two, Linzay Davis, founded parental leave consulting agency Hello, Bundle in San Diego, after navigating her own parental leave; her firm helps soon-to-be parents plan and maximize their leave time. Across assisting nearly 2,000 parents, including financial advisors, Davis said she regularly encounters expecting parents who carefully strategize how to support clients during their leave, but do not spend enough time planning for themselves.

"Start planning for your parental leave early, treat your own leave like a major financial event and lean on professionals the same way you would advise your clients to do," she said.

Advisors who have been through the process say the difference between a stressful leave and a smooth one comes down to preparation. Their experiences offer a practical guide for advisors who want to step away with confidence and then return without losing momentum.

Set firm expectations with clients — and coworkers

Kelsey Ellsworth, vice president and wealth portfolio manager at Johnson Financial Group in Milwaukee, Wisconsin, took three months of parental leave last year when her twins were born. She said what worked for her was taking all of her leave time at once — and completely disconnecting from work.

"Setting a firm boundary and not checking emails while on leave is best in order to avoid mixed messaging with clients and coworkers," she said.

At some firms, parental leave planning is part of the operational model. Derilyn Freeman, a financial advisor at Prudential Advisors in Vienna, Virginia, took two four-month parental leaves, one for each of her children, now ages 3 and 1. She said that when anyone in her firm is preparing for parental leave, they automatically schedule meetings with the lead advisor and their clients.

"We also made sure our clients have met the entire team, either via email, in person or by video call, prior to their advisor's leave so they felt comfortable reaching out and understood they would be fully cared for," she said.

Make clear requests for support from team members

Parental leave succeeds or fails inside the firm, before clients ever feel it. Team members are often willing to step in, but only if advisors clearly ask for, and structure, that support.

Crystal Cox, a senior vice president at Wealthspire Advisors in Madison, Wisconsin, took a 14-week parental leave last summer. Because her practice

operates in a team-based model, most clients were already accustomed to interacting with more than one advisor, which made the transition seamless.

"I was also open with clients throughout my journey to parenthood, and their support was incredible," she said. "To my surprise, several even sent thoughtful gifts, from congratulatory cards to baby clothes, toys and books."

Yesenia Realejo, senior wealth advisor at Tobias Financial Advisors in Fort Lauderdale, Florida, took three months of leave when she had her first child in 2023 and is expecting her second this June. She said her firm has two advisors assigned to each client, making coverage explicit rather than ad hoc.

"None of my clients were upset, as they continued to receive regular firm-wide communication and had points of contacts to reach out to in case they needed anything," she said.

Freeman said the leave process pushed her firm to think bigger, improve efficiencies and communicate more proactively — internally first, and then with their clients.

"Communicate, be honest and transparent and enjoy the wild ride of your children's early years — you won't regret taking the time," she said.

Short leaves and partial connection can work for some

While extended periods of leave to bond with their new children work for some advisors, others felt they couldn't justify it.

Zachary Bachner, investment advisor representative at Summit Financial Consulting in Sterling Heights, Michigan, took parental leave in 2024, but for a relatively limited time.

"Since we do work in a customer service industry, I only took a strict two weeks of leave and then worked from home for a longer period of time," he said.

Similarly, Ryan Salah, certified financial planner and partner at Capital Financial Partners in Towson, Maryland, said after his daughter was born he took only one week off — and during that time he stayed reachable.

"I was still available via phone, text and email," he said. "Zero clients were upset, and some even commented I shouldn't have replied to them while I was out."

Maureen Donahue, principal and financial advisor at Yardley Wealth Management in Yardley, Pennsylvania, just finished her second maternity leave. As part of a small firm where she is one of two lead advisors, she said she didn't feel she could be completely offline during her time out of office.

"Yes, it would be nice to disappear for three months and spend 100% of the time with my newborn," she said. "However, this is not the job I chose, and I owe it to

my partner and clients to stay in touch."